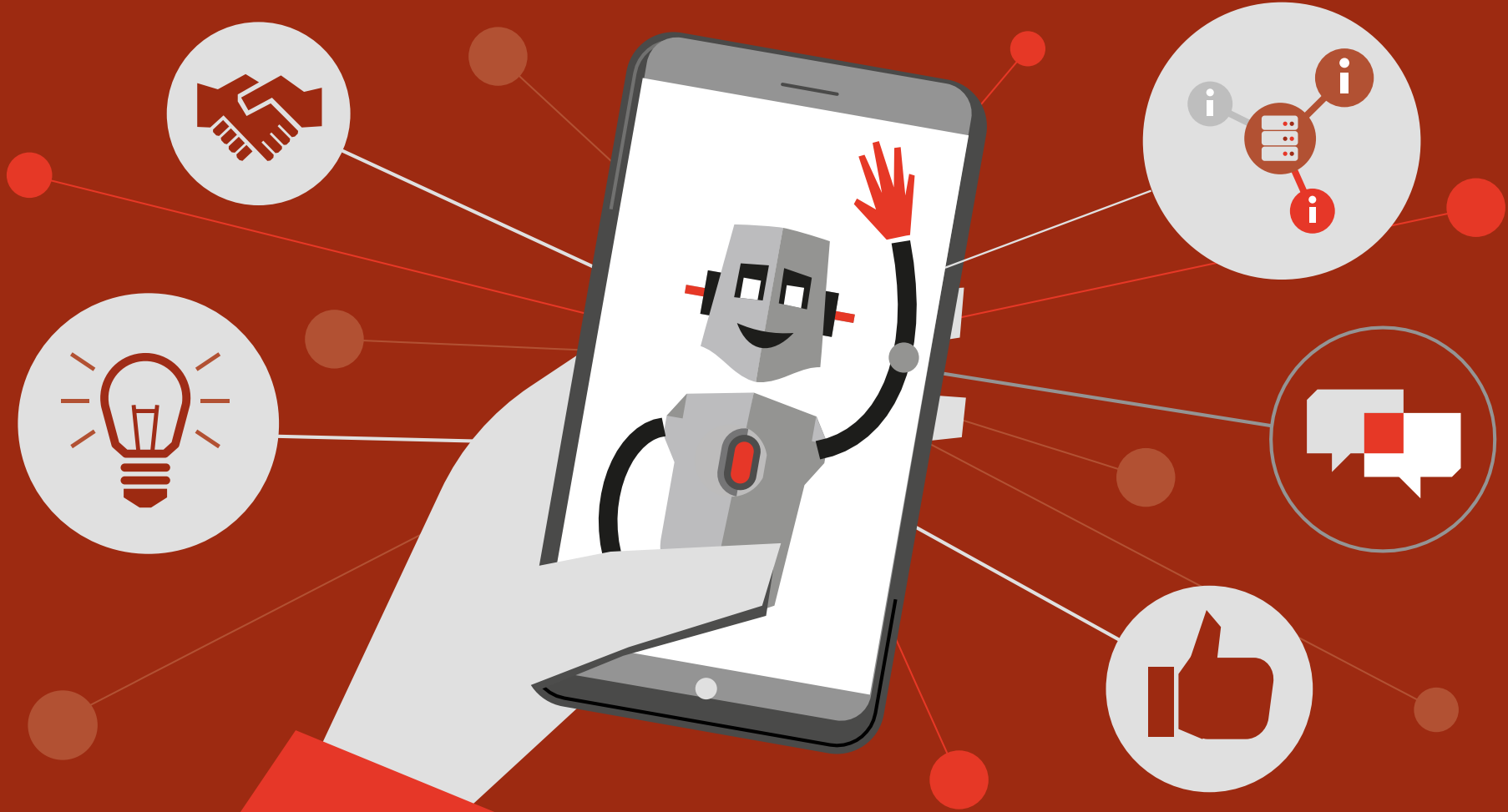


EOS Chatbot Survey 2021

Digital helpers are catching on



Survey profile

Where?

14 European countries: Germany, Denmark, Belgium, Switzerland, Spain, France, Poland, Slovakia, Slovenia, Croatia, Hungary, Bulgaria, Romania and Russia

How?

Phone interviews in the language of the country (CATI)

When?

April – June 2021

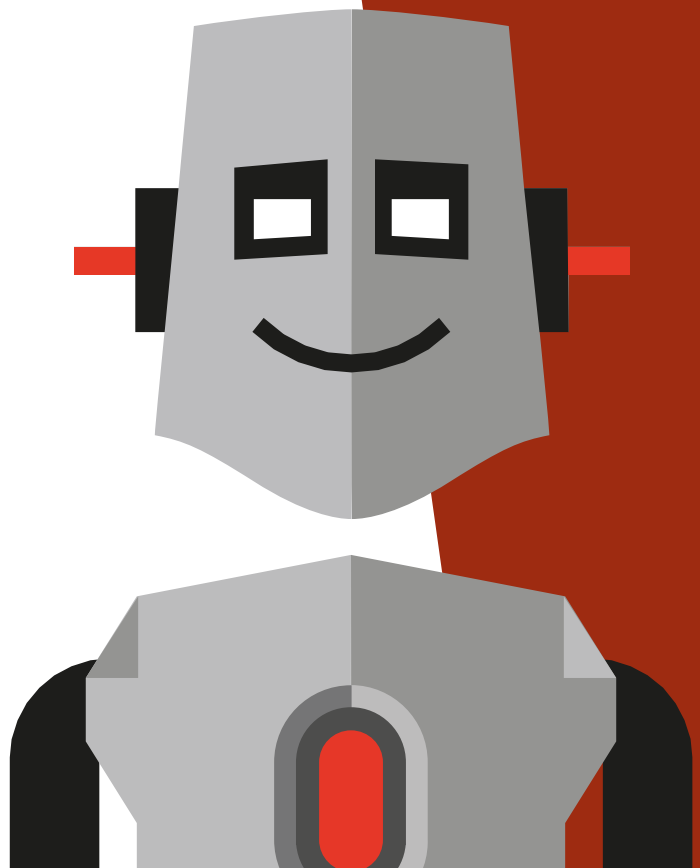
Who?

2,800 decision-makers (200 interviews/country) in B2C companies, e.g. from management, IT, marketing or customer service, were asked about the use of chatbots.

Companies were selected according to headcount and revenue – quota sampling based on distribution in the respective countries

Market research institute

KANTAR



1

Use of chatbots

Companies use various touchpoints in their communication with customers


Communication channels

 **99%**
Phone


 **97%**
Email

 **84%**
In person


 **71%**
Letter


 **57%**
Live chat via company website

 **40%**
Social media

 **33%**
Mobile messaging
(e.g. WhatsApp, FB Messenger)

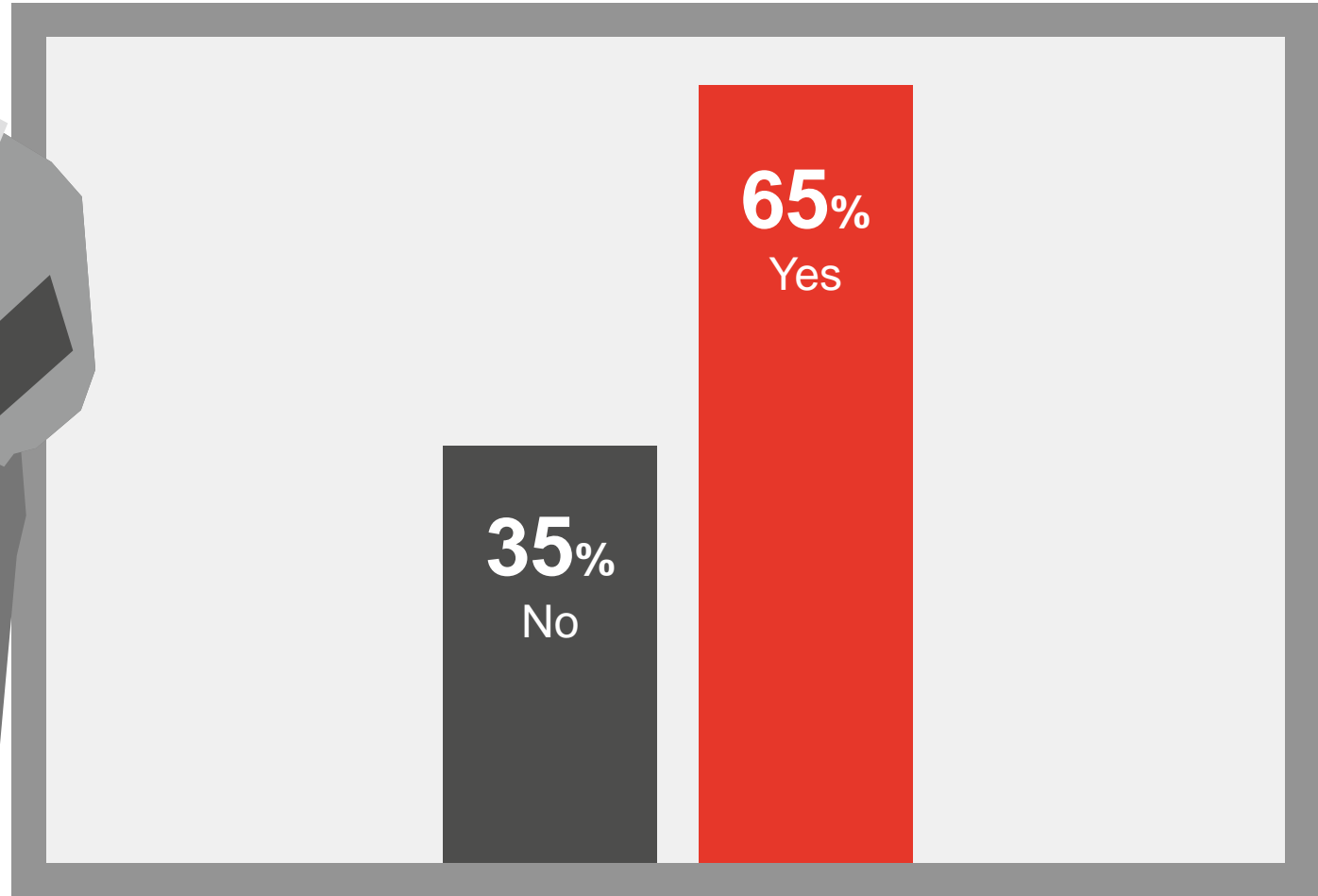
 **32%**
SMS

 **19%**
Live chat via
company app

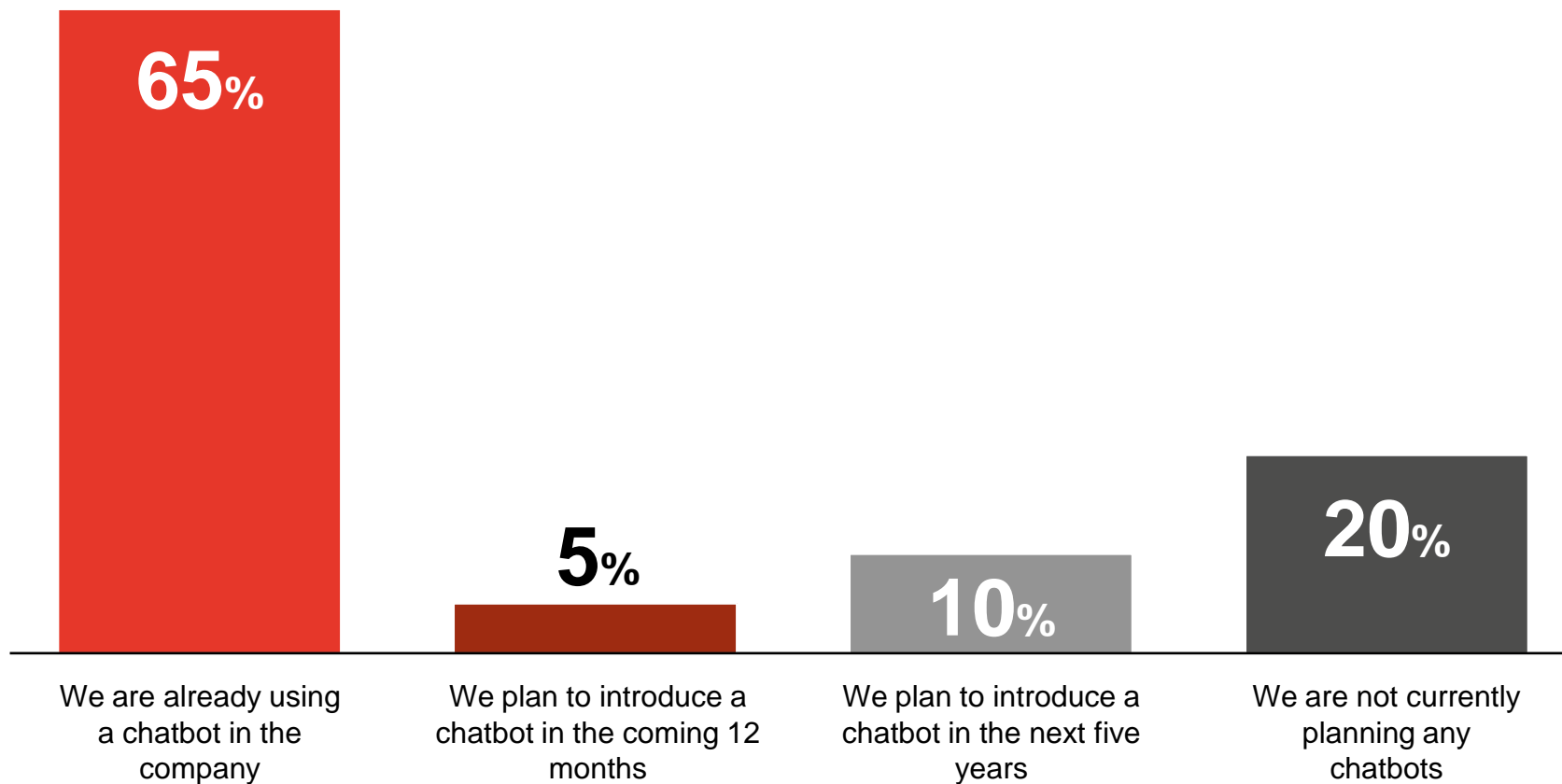
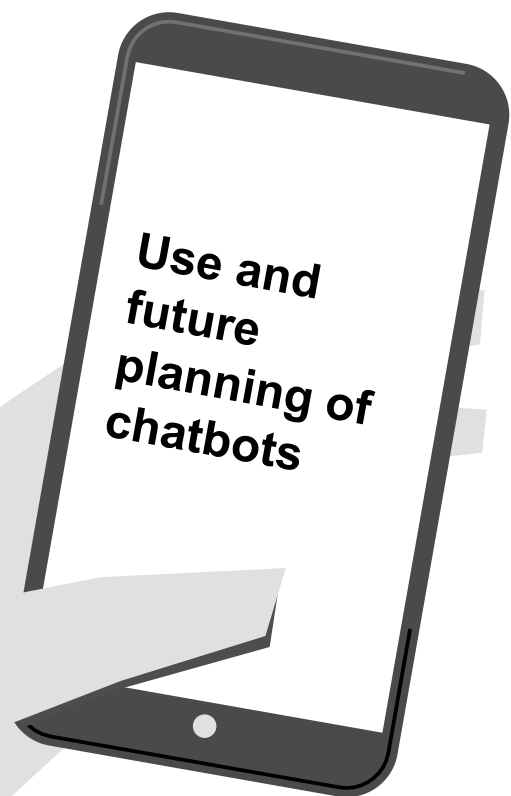
 **5%**
Voice assistants
(e.g. Amazon Alexa, Google Assistant)

Two out of three companies in the B2C segment are already using chatbots

Use of chatbots in communication channels



A minority do not use any chatbots, but 15 percent plan to use them in the next 5 years. 20 percent are not planning any.

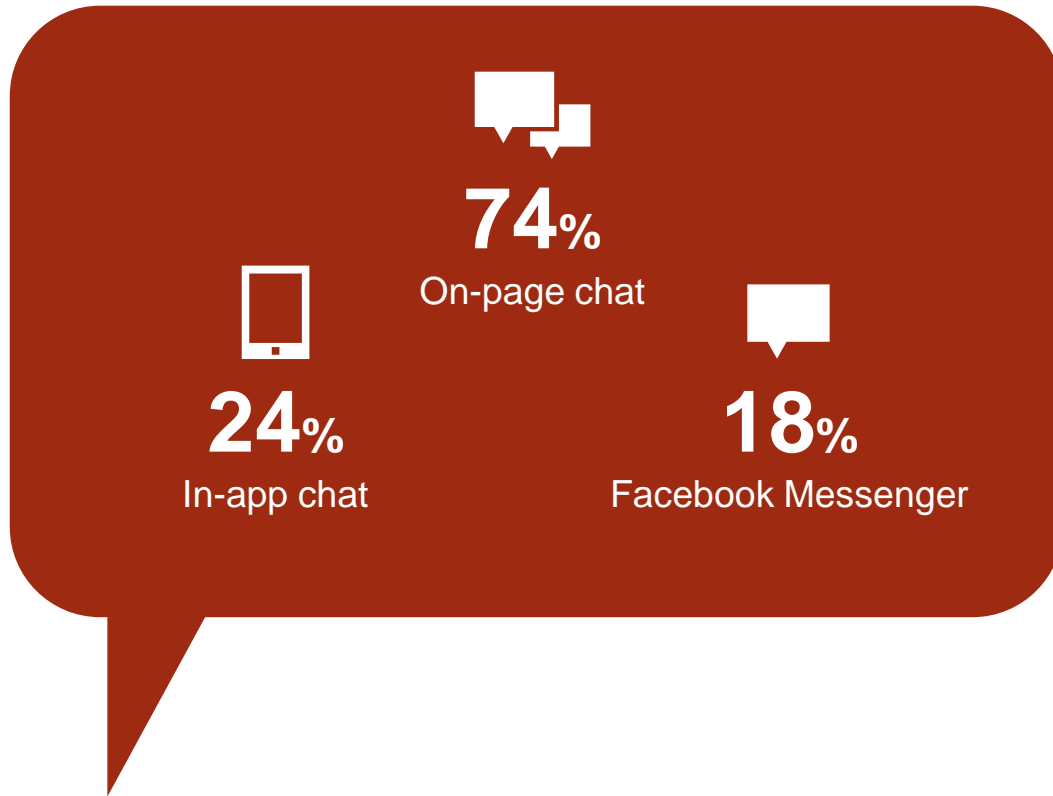


Q02. Do you use chatbots in one or more communication channels with customers?
Q11. You said that you do not use chatbots in your customer communication. Please tell us what your plans are?
Basis: All respondents; data in %

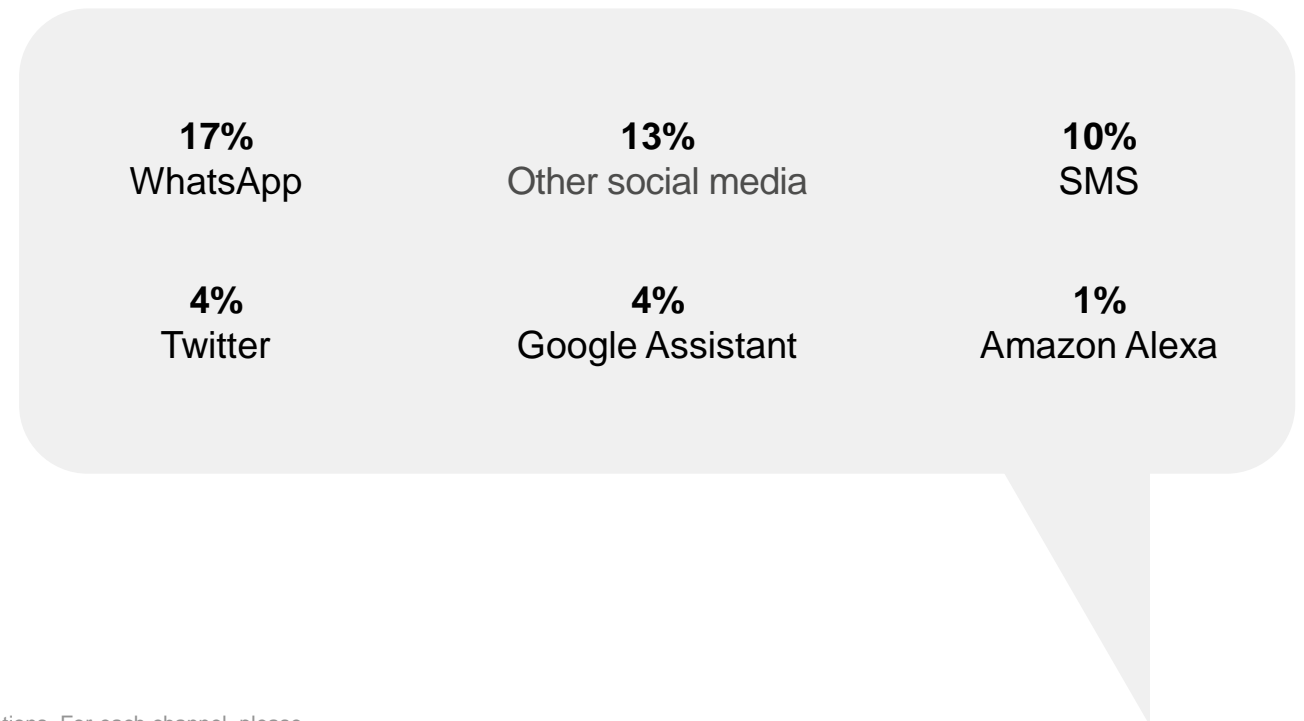


2 Companies with chatbots

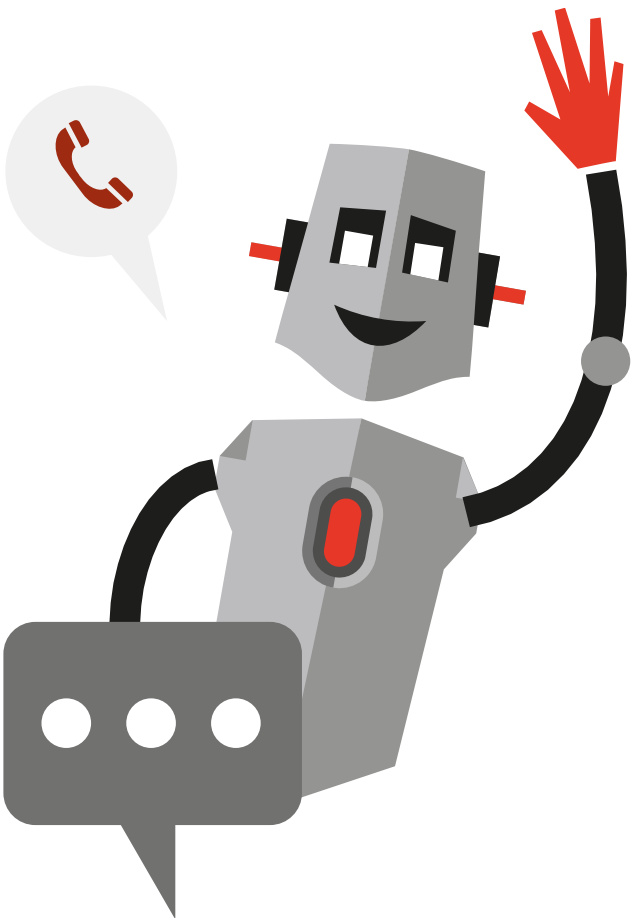
Chatbots are currently used by the majority of companies for on-page chats



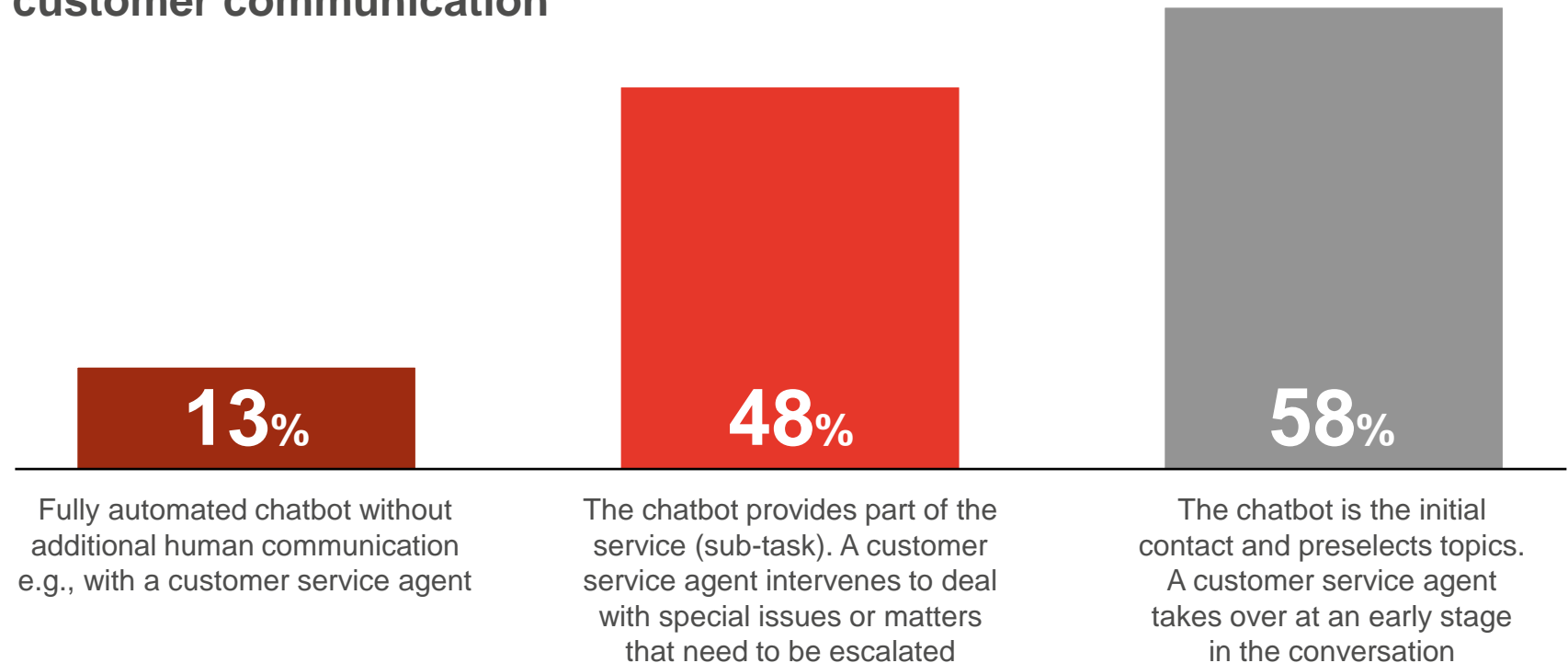
Specific use of chatbots in customer communication



One in ten companies is using fully automated chatbots, and most use bots only for the initial contact with customers



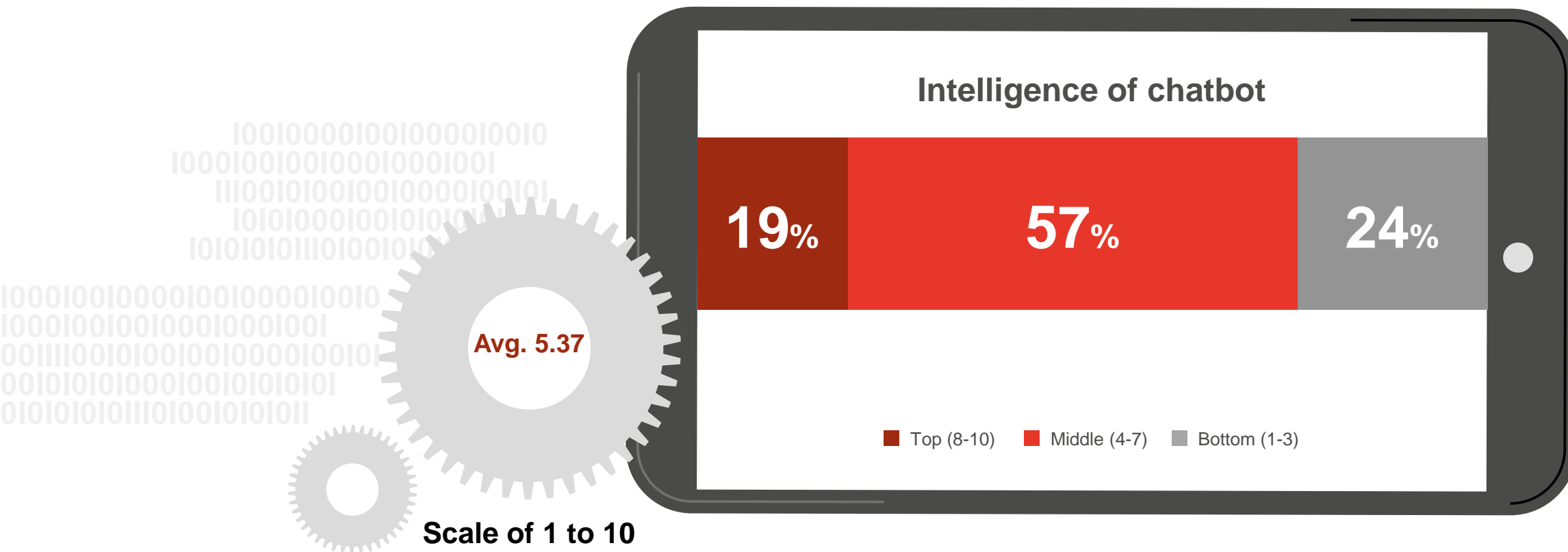
Role of chatbots in customer communication



Q04. Which statement applies to your company? If you use several chatbots, please state all the variants that apply to your company. Basis: All respondents that already use chatbots, data in %.

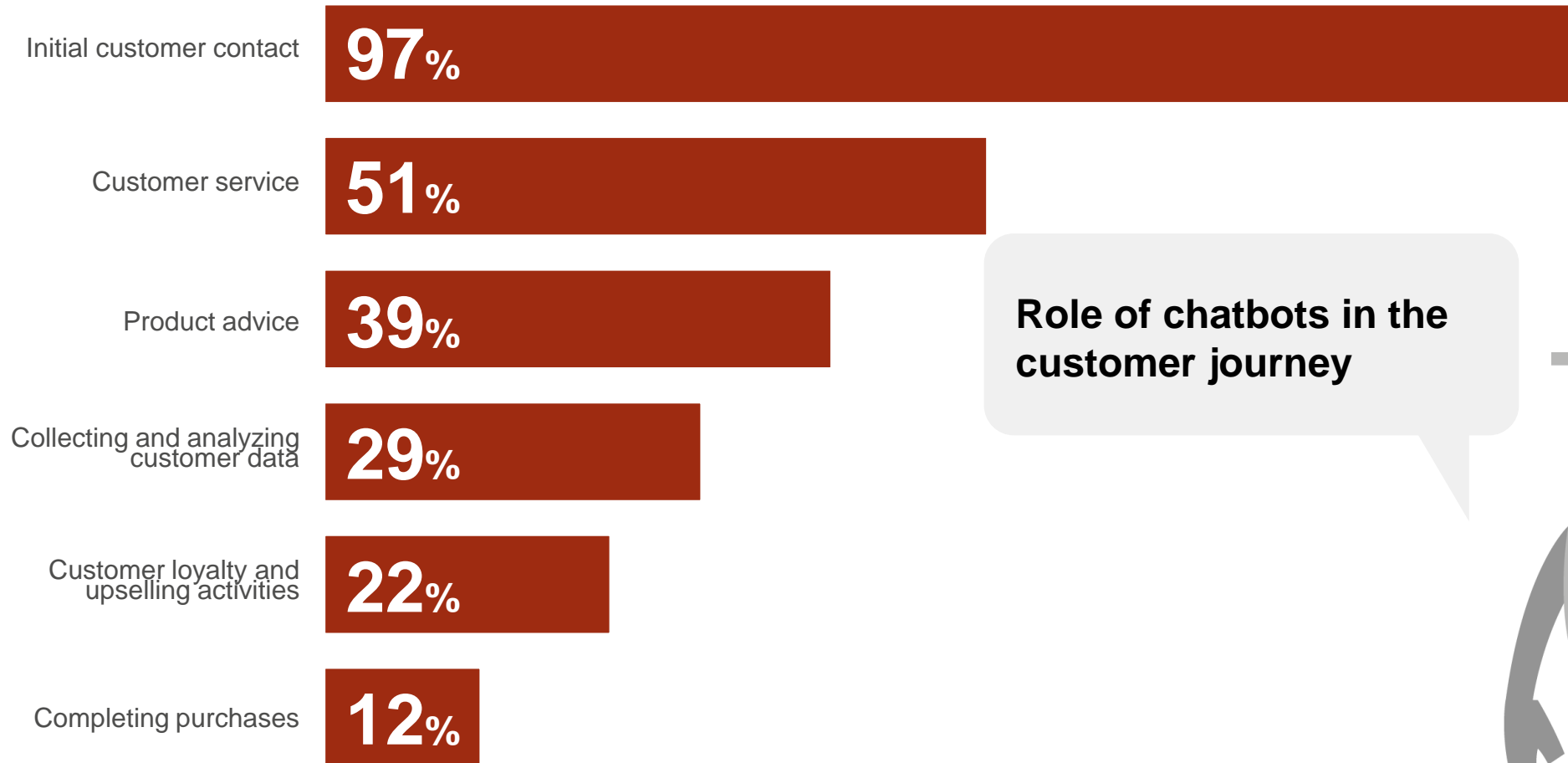
So far, the intelligence level of the chatbots is in the mid-range

One in four is a very simple, rules-based chatbot

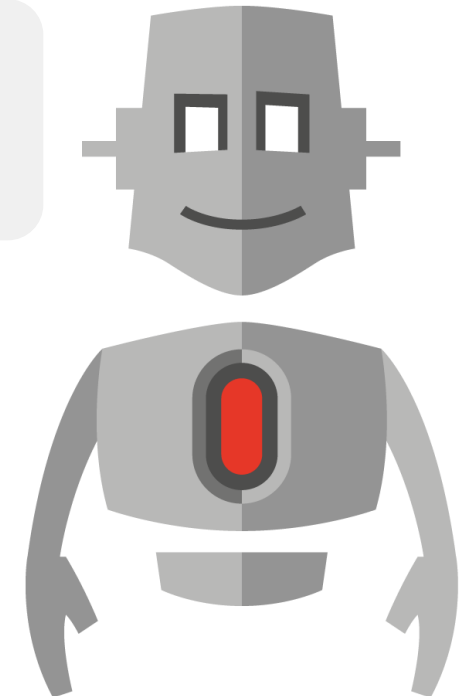


Q05. When you think about the chatbot in your company, what is the intelligence level of your chatbot on a scale from 1 to 10? 1 means a simple, rules-based chatbot and 10 a highly intelligent chatbot. The numbers between 1 and 10 enable further classification. If your company uses several chatbots, please answer for the chatbot that is the most highly developed. Basis: All respondents that already use chatbots, data in %.

Chatbots are used above all for initial customer contact, in customer service, and for product advice



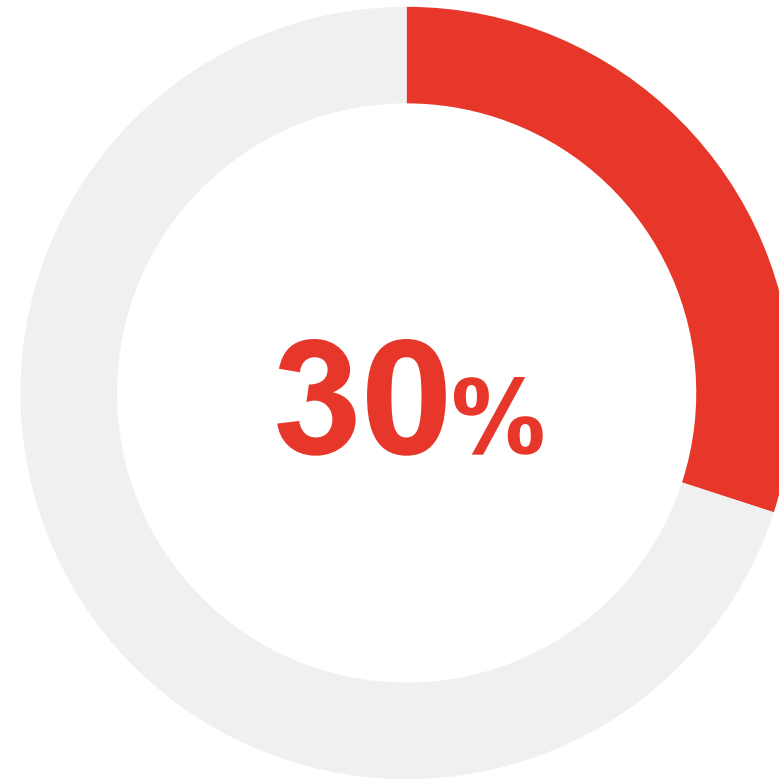
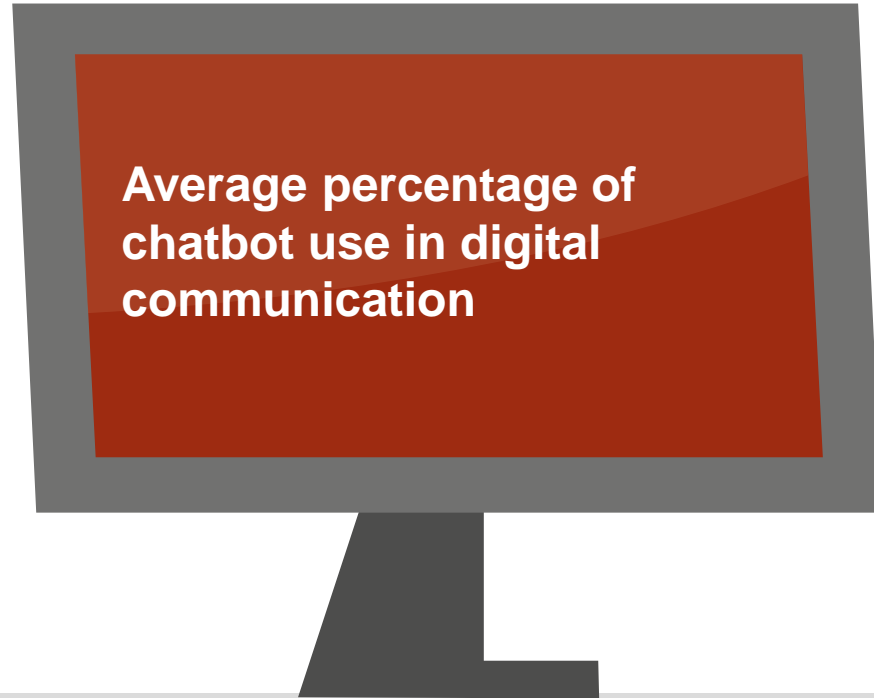
Role of chatbots in the customer journey



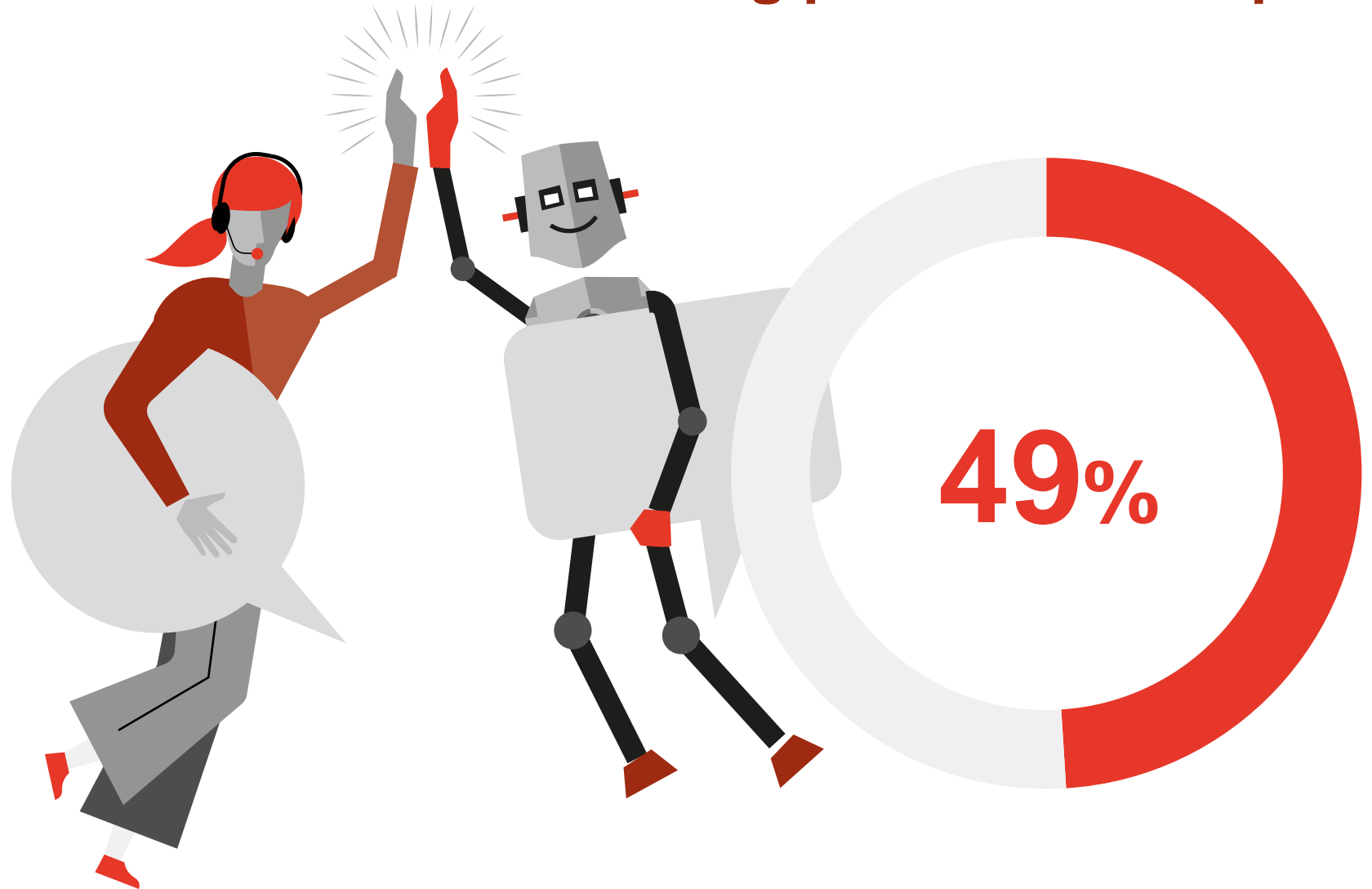
Q06. The use of chatbots can optimize the whole customer journey. For which purposes does your company use chatbots for customer communication? Please state all answers that apply.

Basis: All respondents already using chatbots; 'not specified' responses are not shown

A third of digital communications with customers is currently effected via chatbots

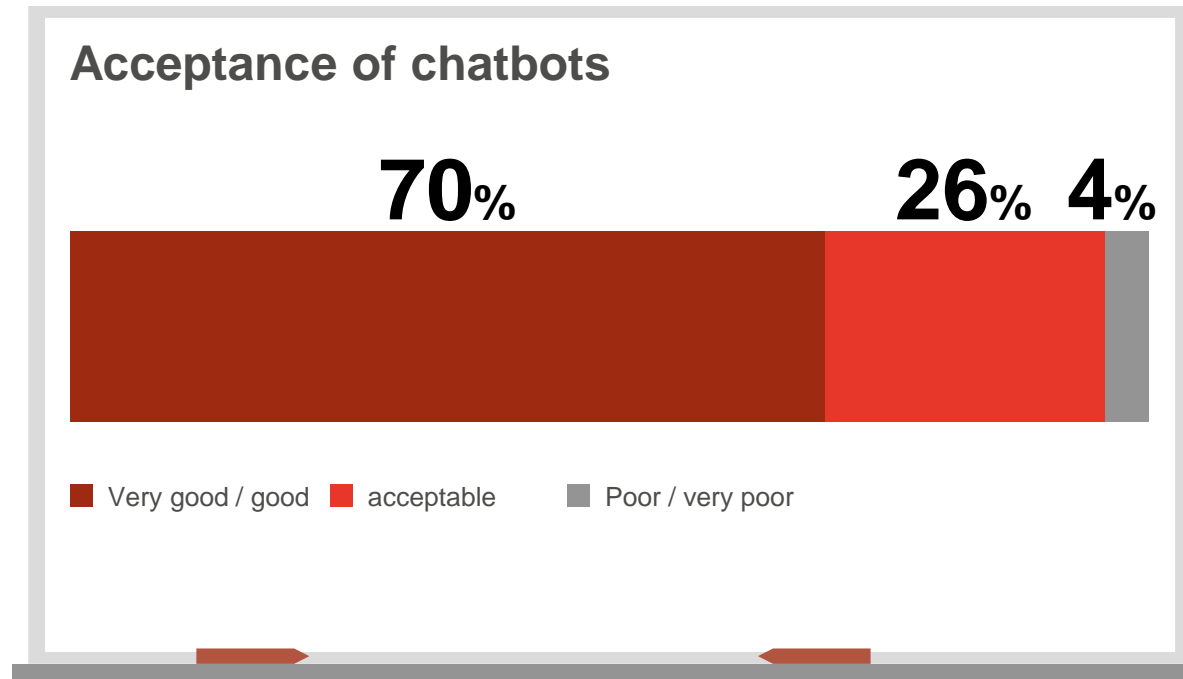


Chatbots make an important contribution to customer communication, with one in two tasks being processed completely

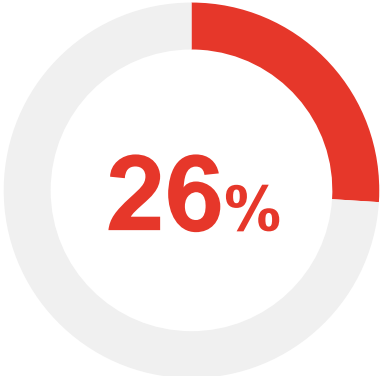


Average percentage of matters resolved with chatbots

70% of companies confirm a high level of acceptance of chatbots among users



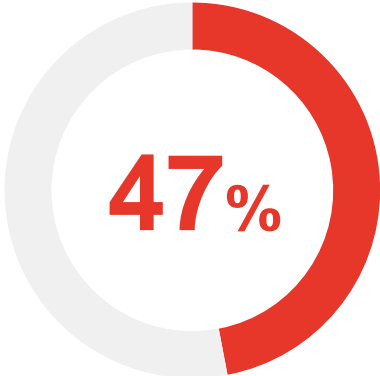
Companies with chatbots plan to improve quantity and quality



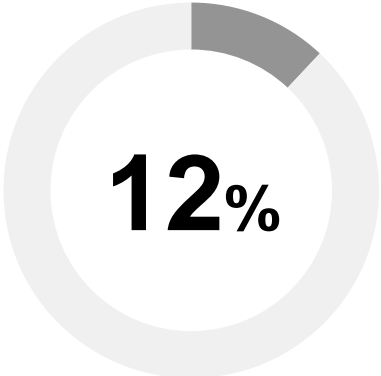
Improve quality / increase intelligence level



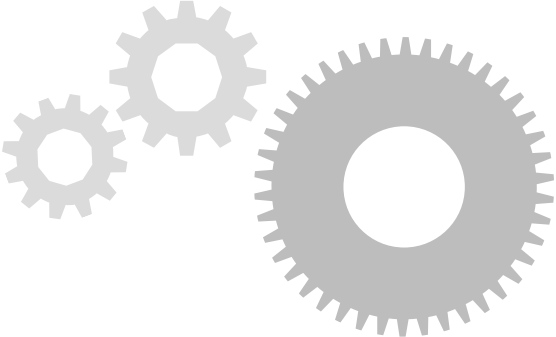
Improve quantity / increase scalability/volume of queries



Improve quality and quantity



Further development not planned



Further development of chatbots used

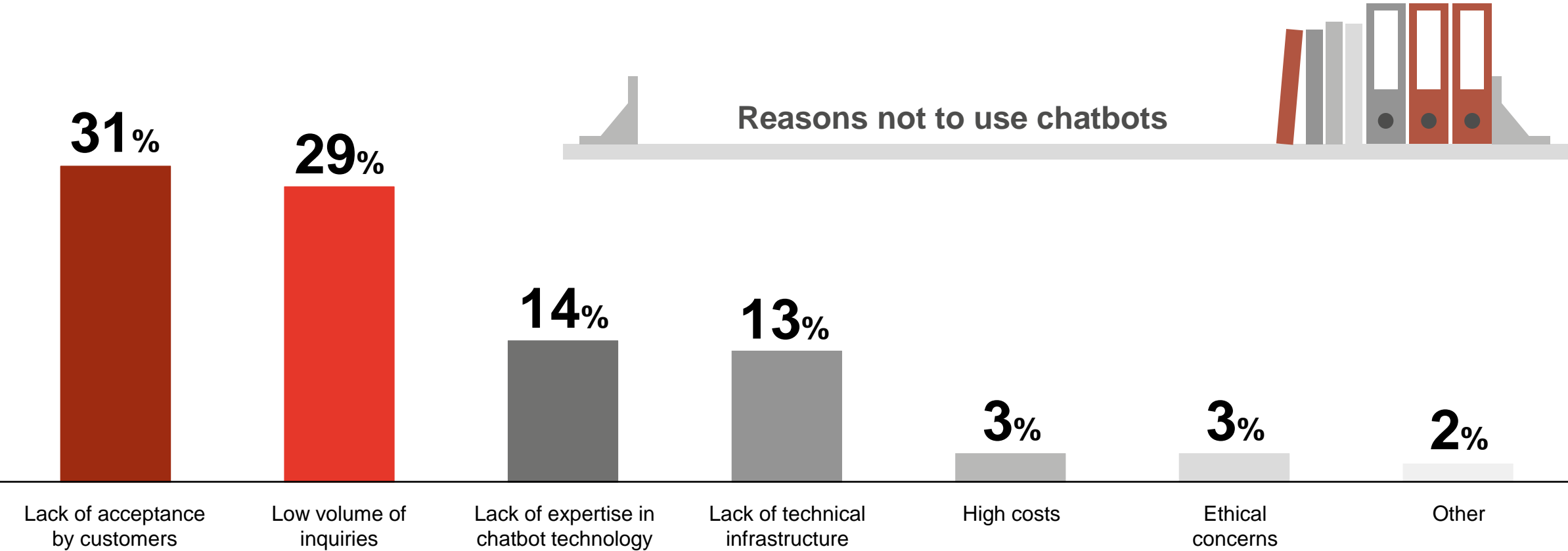
Q10. What are the next goals or steps when you think about developing your chatbot or chatbots?
Basis: All respondents already using chatbots; data in %



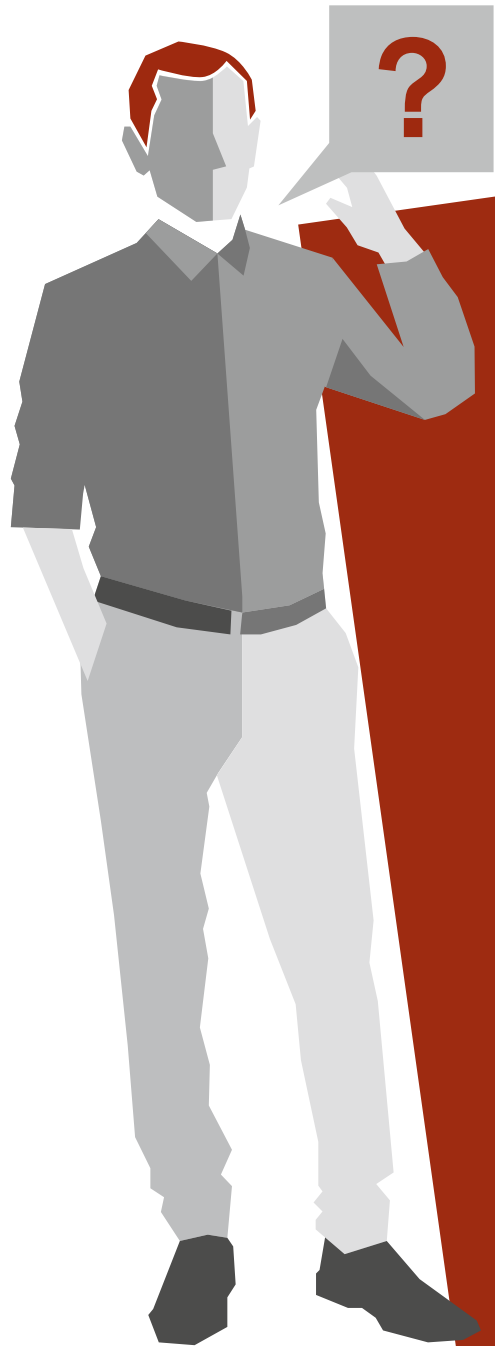
3

**Companies without
chatbots**

Lack of customer acceptance and low volume of inquiries are the main reasons not to introduce chatbots



Q16. What is stopping you from introducing a chatbot in your customer communication?
Basis: All respondents not planning to use chatbots: data in %

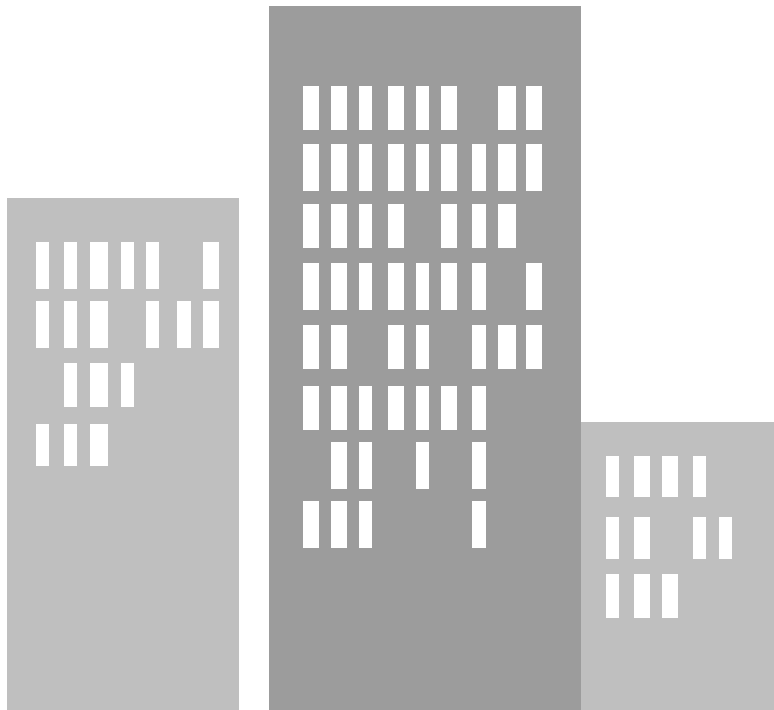


4

**General questions on
chatbots**

Companies mainly expect an increase in employee and customer satisfaction, the generation of data, and cost savings

Benefits of chatbots for companies



64%

Improved employee satisfaction



64%

Generation of data



62%

Improved customer satisfaction



62%

General cost savings



57%

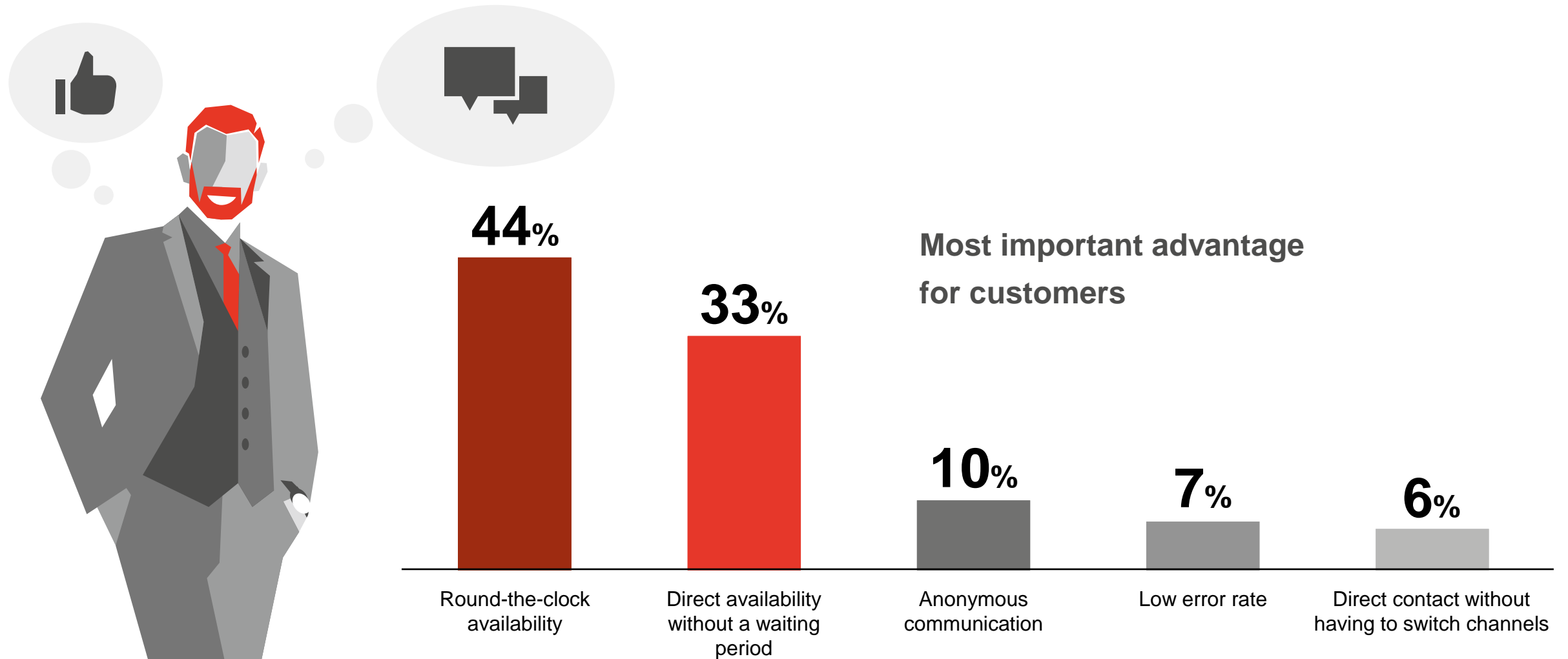
Increase in sales and leads



45%

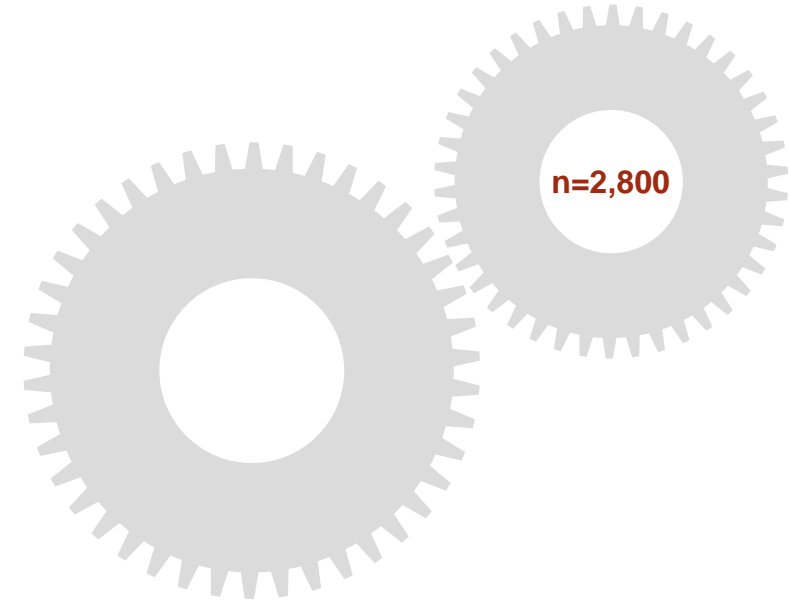
Reduction of personnel

The two most important advantages of chatbots for customers are the 24-hour availability and no waiting times



When companies introduce chatbots they find data privacy and their own data structures challenging

Challenges associated with the introduction of chatbots



70%

Need to clarify comprehensive data privacy law issues like opt-in procedures

59%

Need to comprehensively revise company data structures

58%

Internal expertise for own development and control takes a lot of effort to establish

45%

High dependence on service providers

39%

Little transparency about range of services offered by service providers specializing in chatbots

39%

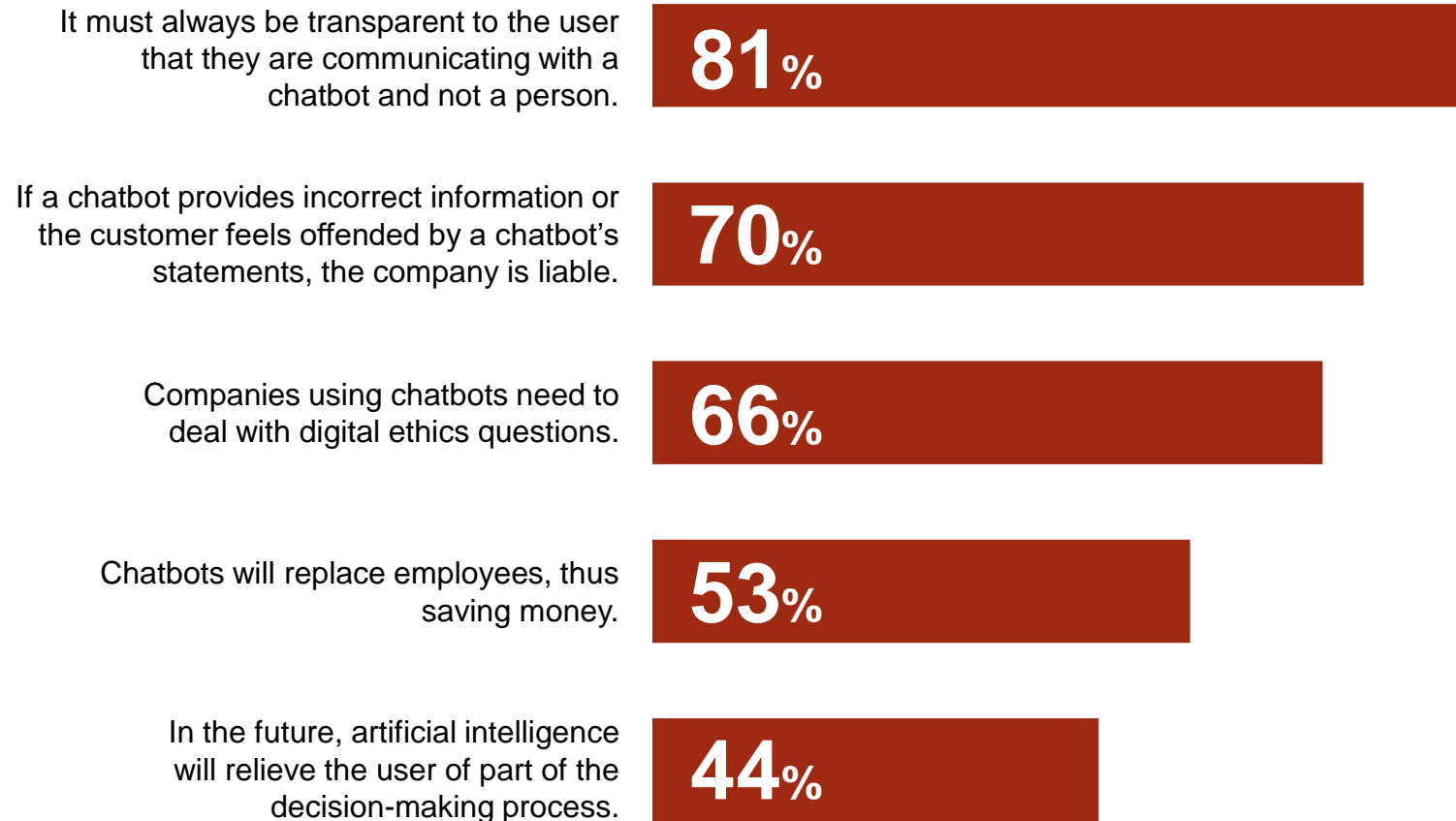
Intelligence level of chatbots relatively low at first, so high degree of errors in interaction with users

27%

Introducing and using chatbots associated with high costs per contact compared with established channels

Transparency towards customers and the question of liability are the issues that most concern companies

Ethical aspects of chatbots



Chatbots have become more important during the pandemic and will continue to gain ground in the future

Importance of chatbots

71%

Chatbots have become more important during the pandemic.

67%

In the digital age, chatbots are an important tool for collecting user data.

61%

A chatbot is essential for all larger companies that communicate digitally.

28%

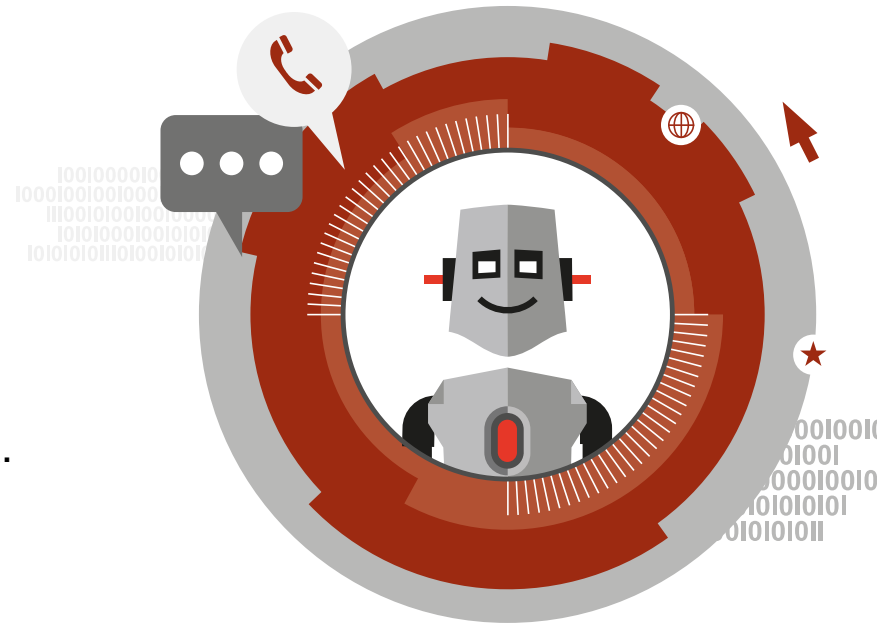
Chatbot technology is currently far from revolutionizing communication using artificial intelligence.

68%

The number of chatbots will increase significantly in the next two years.

63%

The acceptance of chatbots by potential users is increasing.



In future, chatbots will be able to gauge emotions, but only a few respondents think they will do a better job than human beings

Chatbot technology
in the future

In 10 years...

... chatbots will recognize emotions and generate individually appropriate answers
57%

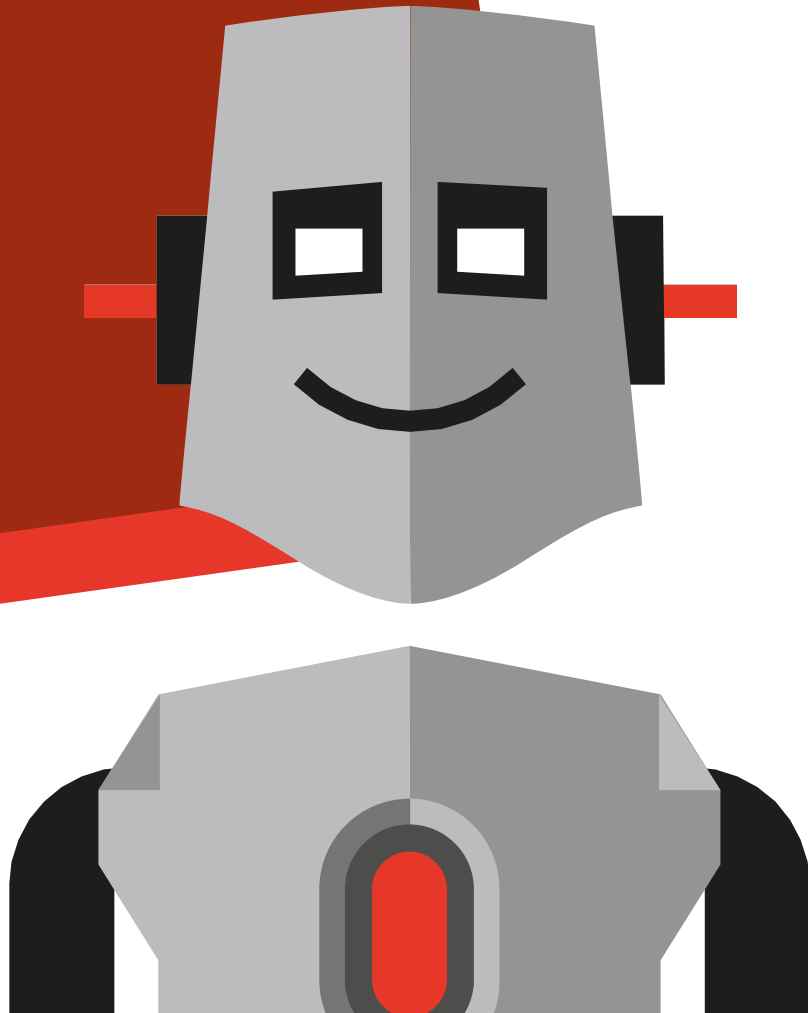
... voice-based chatbots will have replaced text-based chatbots
55%

... users will not know whether they are communicating with a chatbot or a person
49%

... we will be communicating with highly intelligent chatbots daily
47%

... intelligent chatbots will do a better job than people/customer service agents
35%


... chatbots will have replaced apps
31%




Please contact us if you have other questions about the survey or would like to learn more.

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Overview of results

Data in percent

	Total	Belgium	Germany	France	Spain	Switzerland	Denmark	Bulgaria	Romania	Russia	Slovakia	Hungary	Poland	Croatia	Slovenia
Communication channels															
Phone	99	100	100	97	100	100	99	100	100	97	100	100	100	98	100
SMS	32	24	29	28	31	30	32	30	28	82	28	29	27	29	28
Letter	71	80	73	61	69	80	74	76	72	58	71	73	76	64	73
Email	97	100	99	95	100	97	98	94	98	99	98	97	98	95	98
In person	84	85	86	77	82	84	82	86	85	94	83	82	83	81	84
Live chat via company website	57	53	60	45	52	65	57	54	56	77	61	54	60	55	57
Live chat via company app	19	15	16	13	15	15	20	17	17	47	22	18	21	16	14
Mobile messaging (e.g. WhatsApp, FB Messenger)	33	26	24	25	31	28	35	27	31	89	30	29	32	30	26
Social media	40	40	44	30	37	43	44	32	36	74	35	38	42	36	35
Voice assistants (e.g., Amazon Alexa, Google Assistant)	5	1	4	4	5	5	5	4	6	25	4	2	5	4	4
Use of chatbots in communication channels															
Yes	65	66	65	54	60	73	71	64	67	46	71	62	73	71	66
No	35	34	35	46	41	28	30	37	33	53	30	38	28	30	35
Specific use of chatbots in customer communication – Filters: companies with chatbots															
On-page chat	74	70	80	70	79	79	67	68	71	89	78	75	72	62	75
In-app chat	24	20	22	21	22	19	26	24	19	52	26	24	26	21	20
Facebook Messenger	18	17	14	20	20	13	17	16	19	27	17	11	22	18	16
WhatsApp	17	14	17	14	17	14	16	12	15	60	13	12	16	16	14
SMS	10	11	8	5	10	10	9	7	6	37	7	9	9	8	10
Twitter	4	2	3	4	5	3	5	2	1	17	3	4	3	4	5
Other social media	13	2	10	15	11	7	6	10	12	64	10	10	14	8	13
Amazon Alexa	1	2	2	2	3	1			2	5	1	1	1	1	2
Google Assistant	4	1	2	2	3	4	3	2	5	26	3		3	2	5
Viber								14							
Other	14	13	15	16	14	17	12	20	12	12	14	14	14	15	14

Overview of results

Data in percent

	Total	Belgium	Germany	France	Spain	Switzerland	Denmark	Bulgaria	Romania	Russia	Slovakia	Hungary	Poland	Croatia	Slovenia
Role of chatbots in customer communication – Filters: companies with chatbots															
Fully automated chatbot without additional human communication e.g., with a customer service agent.	13	12	10	8	13	16	15	10	8	23	13	15	14	15	11
The chatbot provides part of the service (sub-task). A customer service agent intervenes to deal with special issues or matters that need to be escalated.	48	45	45	45	58	48	50	46	42	62	40	49	51	45	44
The chatbot is the initial contact and preselects topics. A customer service agent takes over at an early stage in the conversation.	58	59	51	68	58	62	58	60	54	73	60	61	51	51	54
Intelligence of chatbot [1: simple, rules-based chatbot – 10: highly intelligent chatbot] – Filters: companies with chatbots															
Top 3 (Code 1-3)	19	12	22	14	17	28	24	20	16	12	14	21	19	23	16
Code 4-7	57	60	55	58	64	50	61	53	57	63	57	56	57	52	60
Bottom 3 (Code 8-10)	24	28	24	28	19	21	16	28	28	25	28	23	23	26	24
Role of the chatbot in the customer journey – Filters: companies with chatbots															
Initial customer contact	97	98	97	97	99	93	99	98	97	93	100	97	95	97	98
Product advice	39	36	42	31	39	39	39	35	35	78	37	43	36	35	37
Completing purchases	12	8	14	12	17	12	10	12	7	18	9	10	12	12	14
Customer service	51	46	57	43	48	53	60	46	47	73	43	55	50	50	50
Customer loyalty and upselling activities	22	23	19	16	26	19	17	18	20	55	22	23	21	21	18
Collecting and analyzing customer data	29	23	26	26	25	26	29	24	26	71	28	26	26	28	29
Percentage of chatbot use in digital communication – Filters: companies with chatbots															
Mean values	29.91	27.09	30.91	31.46	31.55	31.16	31.15	25.86	27.64	40.46	29.79	29.09	27.54	28.55	29.9
Percentage of communication tasks resolved with chatbots – Filters: companies with chatbots															
Mean values	48.95	47.54	48.02	52.71	45.92	43.4	41.83	45	47.6	44.67	56.79	50.02	44.07	56.57	60.67

Overview of results

Data in percent

	Total	Belgium	Germany	France	Spain	Switzerland	Denmark	Bulgaria	Romania	Russia	Slovakia	Hungary	Poland	Croatia	Slovenia
Acceptance of chatbots [1: very good – 5: very poor] – Filters: companies with chatbots															
Top 2 (Code 1-2)	70	71	72	69	72	74	69	74	65	63	72	69	70	67	72
Code 3	26	25	23	31	25	23	28	23	27	36	23	27	23	28	25
Bottom 2 (Code 4-5)	4	4	4	1	3	3	3	3	8	1	5	4	6	6	2
Further development of chatbots used – Filters: companies with chatbots															
Improve quality / increase intelligence level	26	30	29	24	29	27	23	26	25	25	24	25	23	24	29
Improve quantity / increase scalability/volume of queries	15	13	13	16	13	14	16	17	18	5	13	19	17	22	15
Improve quality and quantity	47	45	45	44	48	48	52	47	43	61	49	46	45	42	44
Further development not planned	12	13	12	16	10	11	9	9	14	9	13	10	14	12	12
Future planning for chatbots – Filters: Companies that plan chatbots															
... in the coming 12 months	13	10	6	5	15	11	10	8	7	52	8	9	9	7	4
... in the next five years	28	28	23	16	33	38	24	23	27	28	27	41	38	20	35
We are not currently planning any chatbots.	58	60	70	78	51	51	66	67	64	19	64	49	53	73	61
Reasons not to use chatbots – Filters: Companies that do not use or plan to use chatbots															
High costs	3	7	4	1	5	7	3	4	2		3	3	3	5	2
Low volume of inquiries	29	24	24	36	26	25	38	30	25	9	29	26	28	37	31
Lack of expertise in chatbot technology	14	17	14	8	17	7	13	20	14	27	13	13	17	12	14
Lack of acceptance by customers	31	31	30	29	31	43	36	28	36	27	34	32	31	26	29
Ethical concerns	3	2	2	3				4	5	9	3	5	3	2	5
Lack of technical infrastructure	13	14	12	10	17	11	10	10	14	14	18	13	14	9	17
Other	2		10	1		4				9					
Don't know	5	5	4	11	5	4		4	5	5		8	3	9	2
Benefits of chatbots for companies [Top 2: applies completely, applies]															
Improved customer satisfaction	62	68	62	55	57	67	66	60	64	48	67	60	71	70	63
Increase in sales and leads	57	54	55	53	57	61	60	57	61	47	61	58	53	65	60
Generation of data	64	61	64	57	62	70	67	64	65	60	69	64	67	67	65
Improved employee satisfaction	64	65	64	61	62	62	67	62	67	66	63	64	69	67	65
Reduction of personnel	45	43	47	40	32	45	46	45	48	44	51	50	46	42	48
General cost savings	62	61	60	63	61	66	66	61	62	50	64	62	67	66	64

Overview of results

Data in percent

	Total	Belgium	Germany	France	Spain	Switzerland	Denmark	Bulgaria	Romania	Russia	Slovakia	Hungary	Poland	Croatia	Slovenia
Most important advantage for customers															
Round-the-clock availability	44	43	43	46	40	45	42	43	42	60	43	44	41	40	45
Direct availability without a waiting period	33	33	34	35	35	37	34	35	32	27	34	34	33	33	31
Anonymous communication	10	10	9	11	11	8	9	10	13	6	9	11	9	10	11
Low error rate	7	7	8	4	4	5	5	7	8	6	9	6	10	9	7
Direct contact without having to switch channels	6	8	6	4	10	5	9	5	5	2	6	5	7	8	6
Challenges associated with the introduction and use of chatbots [Top 2: applies completely, applies]															
There is a lack of transparency about the range of services offered by service providers specializing in chatbots.	39	37	38	43	42	38	37	41	44	22	43	44	39	40	41
Internal expertise for in-house development and control takes a lot of effort to build up.	45	40	45	48	50	46	47	45	46	22	51	47	49	42	50
Internal expertise for in-house development and control takes a lot of effort to build up.	58	62	59	62	61	55	57	60	57	40	57	58	59	59	64
Before introducing chatbots you need to comprehensively revise the company data structures.	59	63	60	58	66	62	62	59	64	32	57	65	66	58	60
Introducing and using chatbots is associated with high costs per contact compared with established channels.	27	23	27	30	29	24	26	29	30	13	28	34	27	30	28
Introducing and using chatbots requires the clarification of comprehensive data privacy law issues such as opt-in procedures.	70	77	73	70	73	73	72	76	71	45	72	70	73	70	71
At the start, the chatbot's intelligence level is relatively low, so there is a high level of errors in the interaction with users.	39	37	36	44	41	39	42	37	39	35	40	42	38	39	39
Ethical aspects of chatbots [Top 2: applies completely, applies]															
In the future, artificial intelligence will relieve the user of part of the decision-making process.	44	44	41	43	46	43	46	42	47	36	47	47	48	45	40
If a chatbot provides incorrect information or the customer feels offended by a chatbot's statements, the company is liable.	70	71	68	68	67	68	71	68	70	79	69	73	75	64	72
Chatbots will replace employees, thus saving money.	53	51	55	46	49	60	53	59	56	44	54	59	55	53	51
It must always be transparent to the user that they are communicating with a chatbot and not a person.	81	85	81	76	82	84	85	80	83	76	81	85	82	81	82
Companies using chatbots need to deal with digital ethics questions.	66	70	65	67	66	74	63	56	63	72	63	68	67	66	65

Overview of results

Data in percent

	Total	Belgium	Germany	France	Spain	Switzerland	Denmark	Bulgaria	Romania	Russia	Slovakia	Hungary	Poland	Croatia	Slovenia
Importance of chatbots [Top 2: applies completely, applies]															
Chatbots have become more important during the pandemic.	71	71	69	69	72	70	73	72	72	64	76	72	74	72	67
The number of chatbots will increase significantly in the next two years.	68	68	67	63	62	73	69	66	69	72	73	70	67	71	68
A chatbot is essential for all larger companies that communicate digitally.	61	60	61	54	58	65	66	61	61	62	66	60	64	63	61
Chatbot technology is currently far from revolutionizing communication using artificial intelligence.	28	24	26	31	29	25	22	27	30	43	27	31	26	28	25
The acceptance of chatbots by potential users is increasing.	63	65	61	60	64	64	65	62	61	50	70	59	68	66	64
In the digital age, chatbots are an important tool for collecting user data.	67	67	64	63	67	70	68	67	65	67	69	67	71	69	67
In 10 years... [Top 2: applies completely, applies]															
... we will be communicating with highly intelligent chatbots daily.	47	46	42	43	47	46	48	43	47	51	53	48	51	48	43
... voice-based chatbots will have replaced text-based chatbots.	55	57	52	54	57	52	64	57	57	38	56	61	56	56	56
... chatbots will have replaced apps.	31	32	27	34	27	31	33	30	30	27	33	33	32	35	29
... chatbots will recognize emotions and generate individually appropriate answers	57	57	56	58	60	57	59	55	56	43	62	59	58	62	59
... intelligent chatbots will do a better job than people/customer service agents.	35	32	31	34	29	59	36	32	37	26	36	34	37	33	32
... users will not know whether they are communicating with a chatbot or a person.	49	58	49	49	52	33	51	48	49	26	55	55	55	53	51